Alberta Tourism Market Monitor

+ 2.6%
(YYC & YEG only)

AIR PASSENGERS
(Arrivals and Departures)
September 2017

+3.3%

HIGHWAY COUNT
August 2017

+0.5%
(Banff, Jasper & Waterton only)

NATIONAL PARKS ATTENDANCE
September 2017

-2.8%
(Accommodation and food services)

EMPLOYMENT
October 2017

+3.5 pts
(Total Alberta excluding Resorts)

OCCUPANCY RATE
September 2017

0.0%
No change
(Total Alberta excluding Resorts)

AVERAGE DAILY ROOM RATE
September 2017

+2.9%

RECEIPTS, FOOD SERVICES & DRINKING PLACES
August 2017

+6.5%

HISTORIC SITES & MUSEUMS ATTENDANCE
October 2017

.79 USD
.67 EUR
.60 GBP

EXCHANGE RATES
October 2017

$51.58
(USD/barrel)

OIL PRICE
(WTI)
October 2017

$477
(millions)

MAJOR TOURISM PROJECTS
October 2017

tourism.alberta.ca
Nov 2017

Alberta Government

2017Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2017 (000's of arrivals and departures) [1]													
Edmonton International Total	572.5r	549.5r	608.9r	604.5r	615.8r	592.3r	688.4p	722.8p	**598.0p**	**603.3p**			**6,162.8p**
Per cent change from 2016	1.8%	-0.8%	5.3%	13.0%	4.0%	1.5%	6.7%	8.0%	**1.5%**	**2.9%**			**4.5%**
Domestic	427.2r	412.4r	462.8r	461.7r	523.1r	522.2r	597.4r	632.9p	**517.1p**	**513.6p**			**5,072.0p**
Per cent change from 2016	6.8%	3.6%	8.5%	15.6%	6.2%	4.9%	6.9%	8.0%	**2.7%**	**4.5%**			**6.7%**
Transborder	84.8r	83.4p	90.5p	87.0p	64.6p	48.8r	61.5p	61.1p	**59.8p**	**70.0p**			**716.5p**
Per cent change from 2016	-12.6%	-12.4%	-5.2%	1.2%	-8.5%	-22.5%	2.1%	6.9%	**-3.2%**	**-3.1%**			**-5.5%**
International	60.5p	53.7p	55.6p	55.8p	28.1p	21.4p	29.5p	28.8p	**21.1p**	**19.7p**			**374.2p**
Per cent change from 2016	-7.4%	-12.1%	-1.0%	12.3%	-2.2%	-6.2%	14.8%	10.5%	**-9.8%**	**-11.3%**			**-1.8%**
Calgary International Total	1,234.3r	1,192.3p	1,320.0p	1,296.8r	1,298.5r	1,375.2r	1,573.5p	1,644.2p	**1,385.2p**				**12,321.7p**
Per cent change from 2016	2.2%	-0.1%	1.2%	8.2%	3.2%	4.0%	1.6%	5.2%	**3.1%**				**3.2%**
Domestic	829.6r	796.5p	874.3p	881.6r	941.3r	990.3r	1,137.2p	1,199.7p	**1,003.7p**				**8,655.6p**
Per cent change from 2016	2.0%	-1.9%	-2.2%	5.3%	2.2%	2.4%	1.3%	5.2%	**2.5%**				**2.0%**
Transborder	237.9p	243.5p	279.9p	255.6p	243.7	262.1	296.3p	297.3p	**254.8p**				**2,371.3p**
Per cent change from 2016	0.6%	2.7%	6.4%	15.0%	8.2%	8.8%	2.0%	4.4%	**3.4%**				**5.5%**
International	166.9r	152.3p	165.8p	159.6r	113.6	122.8	140.0p	147.2p	**126.6p**				**1,294.8p**
Per cent change from 2016	5.8%	5.0%	12.3%	14.9%	1.7%	7.7%	2.7%	7.2%	**8.3%**				**7.4%**
Fort McMurray International Total	58.1p	54.9p	61.6p	63.0p	64.6p	61.1p	60.0p	62.4p	**57.0p**				**543.9p**
Per cent change from 2016	-14.5%	-22.7%	-19.4%	-12.7%	n/a*	32.5%	-15.3%	-16.0%	**-14.9%**				**-2.1%**
Highway Count 2017 (000's of vehicles) [2]													
Hwy 1 - Sask border w-bound	57.7	57.7	65.3	74.8	81.1	87.3	114.4	113.1					651.4
Per cent change from 2016	1.1%	0.4%	-8.0%	11.3%	2.4%	4.6%	0.8%	4.0%					2.1%
Hwy 1 - Banff Pk Gate (2-way)	538.7	525.2	591.6	615.4	722	775.3	1,053.8	1,037.8					5,860
Per cent change from 2016	-0.6%	-4.6%	-5.5%	7.3%	5.3%	4.6%	2.2%	2.3%					1.6%
Hwy 16 - Jasper Pk Gate (2-way)	89.8	87.7	110.3	121	152.2	186.8	250.7	262.7					1,261.2
Per cent change from 2016	-0.3%	-1.5%	-7.2%	5.8%	2.1%	7.6%	-1.5%	5.3%					1.8%
Hwy 16 - Blackfoot w-bound	143.9	141.8	160.4	161.4	180.3	184.7	191.1	198.7					1,362.3
Per cent change from 2016	0.0%	1.9%	0.1%	0.4%	3.1%	5.4%	2.6%	5.2%					2.5%
National Park Attendance (000's of visitors) 2017 [3] Does not include Group Tours													
Banff	201.7	201.6	228.4	267.8	320.0	370.6	688.3	674.8	**491.7**				**3,444.9**
Per cent change from 2016	2.6%	-5.0%	-4.5%	10.4%	6.5%	6.0%	1.2%	2.3%	**3.5%**				**2.7%**
Jasper	51.2	52.0	64.9	151.1	186.3	224.5	465.2	468.3	**331.1**				**1,994.6**
Per cent change from 2016	0.3%	-5.8%	-9.4%	7.7%	3.3%	6.2%	-0.6%	3.4%	**3.7%**				**2.3%**
Waterton Lakes	9.2	9.6	12.7	20.4	56.3	92.4	162.7	137.0	**45.4**	**17.2**			**562.9**
Per cent change from 2016	8.7%	-16.9%	-3.3%	4.1%	34.4%	15.5%	24.5%	12.0%	**n/a****	**-14.1%**			**8.8%**
Elk Island	17.9	18.8	22.6	26.3	69.9	68.6	91.9	88.6	**67.4**	**36.0**			**508.0**
Per cent change from 2016	29.6%	16.4%	16.5%	-5.7%	94.0%	70.9%	69.9%	67.8%	**77.0%**	**79.1%**			**59.5%**
Wood Buffalo	0.02	0.01	0.01	**0.34**	**0.47**	**0.60**	**1.06**	**1.02**	**0.33**				**3.85**
Per cent change from 2016	214.3%	-72.2%	-39.1%	**627.7%**	**-5.6%**	**11.6%**	**11.1%**	**25.3%**	**-18.6%**				**16.0%**
Employment (000's of persons) 2017 Seasonally Adjusted [4]													
Accommodation and Food Services	143.8p	144.9p	146.4p	147.5p	149.2p	150.7p	154.6p	158.1p	150.3p	**145.0p**			**149.1p**
Per cent change from 2016	4.4%	6.5%	5.6%	5.8%	5.5%	2.6%	6.2%	4.9%	-0.1%	**-2.8%**			**3.7%**

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada and Statistics Canada.

Accommodation Indices for Major Regions 2017 [3]

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	46.8%	56.7%	62.0%	59.6%	55.3%	56.3%	60.6%	63.0%	61.7%				58.0%
Point change from 2016	-3.1	-1.7	0.8	-1.0	-19.2	-5.7	1.5	2.9	0.6				-2.7
Average Daily Room Rate	$128.56	$133.48	$133.13	$132.44	$130.55	$128.54	$126.3	$126.86	$129.91				$129.98
Variance from 2016	-1.0%	0.1%	0.3%	0.7%	4.7%	-0.1%	-0.6%	-0.1%	1.2%				0.8%
Revenue per available room	$60.13	$75.67	$82.48	$78.87	$72.22	$72.42	$76.48	$79.94	$80.15				$75.42
Calgary Occupancy Rate	42.5%	50.8%	53.0%	56.1%	58.9%	67.0%	76.9%	73.6%	71.2%				61.2%
Point change from 2016	-3.1	0.5	-0.4	-0.3	-4.4	-0.7	-1.2	2.7	3.8				-0.3
Average Daily Room Rate	$134.61	$138.79	$138.10	$139.35	$145.41	$151.16	$166.01	$136.90	144.82				$145.05
Variance from 2016	-4.7%	-1.5%	-1.2%	-3.3%	2.8%	-4.1%	-0.7%	0.7%	-2.2%				-1.4%
Revenue per available room	$57.15	$70.45	$73.26	$78.16	$85.65	$101.23	$127.63	$100.76	$103.04				$88.80
Alberta Resorts Occupancy Rate	42.9%	53.2%	56.4%	53.7%	68.4%	84.5%	92.9%	93.7%	91.7%				71.4%
Point change from 2016	0.2	-1.0	0.7	6.2	4.1	0.2	-0.4	-0.2	3.7				1.8
Average Daily Room Rate	$195.37	$206.57	$198.74	$190.13	$224.58	$313.61	$375.65	$375.64	$314.41				$285.35
Variance from 2016	6.8%	6.5%	2.4%	7.0%	6.8%	13.5%	13.9%	13.7%	11.3%				10.4%
Revenue per available room	$83.72	$109.80	$112.13	$102.18	$153.64	$264.95	$348.96	$351.93	$288.31				$203.78
Other Alberta*** Occupancy Rate	37.4%	42.0%	46.0%	42.1%	47.0%	54.1%	56.5%	56.5%	55.2%				48.7%
Point change from 2016	2.2	2.7	6.1	2.9	4.2	5.8	4.7	4.3	4.7				4.3
Average Daily Room Rate	$115.85	$115.98	$115.99	$116.30	$116.84	$117.84	$122.49	$122.61	$120.44				$118.80
Variance from 2016	-5.2%	-6.0%	-3.8%	-1.0%	2.3%	-4.9%	-1.2%	1.0%	1.4%				-1.8%
Revenue per available room	$43.33	$48.72	$53.38	$48.93	$54.96	$63.80	$69.16	$69.26	$66.49				$57.83
Total Alberta (excl. Resorts) Occupancy Rate	41.6%	48.9%	52.8%	51.1%	52.9%	58.6%	63.8%	63.4%	61.8%				55.0%
Point change from 2016	-0.8	1.0	3.0	1.2	-4.5	0.9	2.4	3.7	3.5				1.2
Average Daily Room Rate	$125.81	$129.01	$128.57	$129.04	$130.30	$132.14	$139.42	$128.77	$131.51				$130.80
Variance from 2016	-3.9%	-2.4%	-1.7%	-1.3%	3.0%	-3.4%	-0.9%	0.7%	0.0%				-1.0%
Revenue per available room	$52.33	$63.03	$67.83	$65.93	$68.87	$77.46	$88.93	$81.68	$81.27				$71.93

Accommodation Indices for Selected Cities or Towns 2017 [4]

Occ%= Occupancy Rate
ADR= Average Daily Room Rate
RevPar= Revenue Per Available Room

	September			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	51.2%	$99.26	$50.81	45.9%	$100.67	$46.25
Bonnyville	40.0%	$102.43	$40.94	36.5%	$104.69	$38.24
Drayton Valley	63.2%	$109.03	$68.92	48.7%	$110.05	$53.56
Edson	70.4%	$118.66	$83.58	61.7%	$113.14	$69.86
Fort Saskatchewan	36.9%	$102.54	$37.87	29.7%	$108.39	$32.19
High Level	54.6%	$120.18	$65.63	46.8%	$121.68	$56.96
Innisfail	36.6%	$83.83	$30.68	32.2%	$80.15	$25.79
Leduc	51.4%	$98.81	$50.84	49.2%	$98.45	$48.43
Lloydminster	44.1%	$108.98	$48.02	49.3%	$112.60	$55.50
Nisku	53.1%	$96.74	$51.34	54.1%	$96.96	$52.45
Sherwood Park	37.8%	$123.15	$46.52	40.0%	$126.25	$50.51
Total Alberta	65.2%	$163.35	$106.53	57.2%	$153.67	$87.92

	September			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar
Banff	89.2%	$289.07	$257.98	77.1%	$246.81	$190.32
Canmore	93.1%	$190.93	$177.76	67.4%	$181.48	$122.33
Drumheller	52.7%	$132.57	$69.82	45.1%	$139.90	$63.02
Fort Mac	62.6%	$150.81	$94.40	54.6%	$144.93	$79.19
Gr. Prairie	75.9%	$129.58	$98.40	63.1%	$124.05	$78.30
Hinton	89.2%	$166.14	$148.22	62.8%	$151.27	$94.93
Jasper	94.3%	$273.29	$257.62	74.3%	$244.17	$181.35
Lethbridge	58.3%	$110.08	$64.22	52.3%	$108.51	$56.76
Med. Hat	66.9%	$109.77	$73.42	55.1%	$110.38	$60.85
Red Deer	45.6%	$109.02	$49.71	41.8%	$104.84	$43.78
Whitecourt	40.8%	$108.87	$44.45	41.2%	$110.81	$45.66

Sources: CBRE Hotels Trends in the Hotel Industry National Market Report and STR Inc.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Food Services and Drinking Places 2017 ($ Millions) unadjusted[7]													
Total Receipts for Alberta	690.96r	675.10r	752.82r	755.04r	786.15r	**792.90r**	**801.10r**	**798.60p**					**756.58p**
Per cent change from 2016	0.3%	-2.1%	1.6%	1.6%	1.5%	**4.4%**	**3.6%**	**2.9%**					**1.5%**
Historic Sites and Museums 2017 (000's of visitors)[8]													
Visitor Attendance****	10.5p	25.3p	27.5p	36.9p	70.3r	105.7p	190.1p	194.0p	71.6p	**31.6p**			**764.7p**
Per cent change from 2016	-0.9%	**2.9%**	-24.2%	10.8%	-3%*****	10.9%	0.1%	13.5%	9.0%	**6.5%**			**5.2%**
Exchange Rates 2017[9]													
Canadian Dollar/U.S. Dollar (noon)	0.76	0.76	0.75	0.74	0.73	0.75	0.79	0.79	0.81	**0.79**			**0.77**
Canadian Dollar/ Euro	0.71	0.72	0.70	0.69	0.67	0.67	0.68	0.67	0.68	**0.67**			**0.69**
Canadian Dollar/ Great British Pounds	0.61	0.61	0.61	0.59	0.57	0.59	0.61	0.61	0.61	**0.60**			**0.60**
Oil Price: Western Texas Intermediate (WTI) 2017[10]													
Cushing, OK Spot Price (US Dollar per Barrel)	52.5	53.47	49.33	51.06	48.48	45.18	46.63	48.04	49.82	**51.58**			**49.61**
Major Tourism Projects Valued $5 million or Greater 2017 ($ Millions)[11]													
Total Value of Hotel Projects Inventory	$666	$499	$449	$450	$450	$444	$444	$444	$444	**$477**			**$477**
Sources: Statistics Canada, Alberta Culture and Tourism, Bank of Canada, WTI, Government of Alberta.													

*Commercial Air Service Suspended from May 5, 2016 - June 10, 2016 due to wildfire in Fort McMurray.

**The Waterton Lakes National Park was closed to the public from September 8 - 20, 2017, due to the fire.

***Other Alberta includes Lethbridge, Red Deer and other Alberta communities.

****Please note some of the historical sites have changed their hours of operation - see Notes section for details.

*****Oil Sands Discovery Centre was excluded because of wildfire in Fort McMurray last year.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport has been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport websites.

2. Highway Traffic - These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders count all vehicles by direction. Year to date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only and do not include people travelling as part of a tour group. Tour group data is included in the annual edition of Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay, profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Accommodation indices for Selected Cities or Towns - Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.
Source: STR Inc.

7. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the three-digit NAICS level of 722, which includes: full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

8. Historic Sites and Museums - Visitor attendance figures are monthly totals based on 14 historic sites, the Royal Tyrrell Museum of Palaeontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015.
Source: Alberta Culture and Tourism.

9. Exchange Rate - This is the average monthly exchange rate.
Source: Bank of Canada.

10. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

11. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

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